



THE KENYA PHILANTHROPY FORUM

REPORT ON
CONVENING ON DATA
MANAGEMENT IN
PHILANTHROPY

SOUTHERN SUN
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Compiled by:

Anne Dalitz, UNDP Kenya

Mary Kanyua, Viwango

Catherine Mwendwa, East African Association of Grant Makers

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1.BACKGROUND

There is an emerging new paradigm for development in Africa that lays great emphasis on the importance of credible and good quality data for decision making at all levels to ensure evidence based governance and implementation to more effectively impact the quality of lives especially of the poor, vulnerable and marginalized sections of our population. Inadequate data on the philanthropy sector has hitherto been a great constraint for deeper impact on the contribution of the sector to national development. Accurate and reliable data and relevant information on the philanthropy sector is thus urgently needed to reflect the potential and contributions of the current philanthropy landscape especially as the world moves towards adopting the Sustainable Development Goals (SDGs) in September 2015.

Kenya lacks an organized framework for collecting reliable and comparable data on philanthropy in the country. It is on this basis that the Kenya Philanthropy Forum organized a Data Management Convening that seeks to bring together philanthropy institutions to explore opportunities to strengthen data management for greater influence and impact of the sector on National development efforts in Kenya.

The forum was made possible with support from the East African Association of Grant makers (EAAG), the Post-2015 Partnership Platform for Philanthropy at UNDP Kenya and the Aga Khan Foundation. A total of 30 foundations and trusts were in attendance.

From the forum, the key recommendations that emerged included:

- The need to establish the principles for data management for philanthropy
- Expand forum so that participation reflects the size and diversity of existing forms of philanthropy
- Develop a standardized tool for data collection
- Actively engage in the existing philanthropy data initiative.
- Partner with the KNBS to establish data sets that effectively capture the contribution of philanthropy in Kenya's development.

2.INTRODUCTION

a. Arif Neki – the National Coordinator on the Platform for Philanthropy, UNDP Kenya

Arif Neki welcomed participants to the meeting. He noted that Kenya lacks an organized framework for collecting reliable and comparable data on philanthropy in Kenya. There is a wave of data revolution globally and this has influenced Kenya's future approach in collecting data. The growing demand for philanthropy data emphasises its value in planning, implementing and evaluating development plans. There is therefore need for a collective voice for philanthropy in Kenya to effectively respond to this demand. He acknowledged contribution of the East Africa



Welcoming Participants – Arif Neki of UNDP Kenya

Association of Grant makers and the Aga Khan Foundation towards the forum for philanthropy.

b. Susan Odongo – Team Leader Policy, Research and Advocacy, KCDF

Background to the Kenya Philanthropy Forum: The Kenya Philanthropy Forum was formed and conceptualized with the aim of:

- Consolidating various philanthropy conversations to form an inclusive collective voice for philanthropy in Kenya
- Having a participatory and consultative process involving various philanthropy organizations and philanthropy actors in Kenya.

The forum has a planning team comprised of the different types of foundations. The planning team aids in giving the strategic leadership for the forum. EAAG and KCDF are providing secretariat support.

As the team consolidated and reviewed key interventions in establishing the forum, it became clear that a Data Forum was needed to enable members understand what the essence of data management and to explore data as a critical element towards demonstrating the value of the sector.

3.OPENING REMARKS

a. Wilmot Reeves- Economic Advisor, UNDP Kenya

Under the framework 'Delivering as One', UNDP Kenya seeks to forge strategic partnerships with philanthropy in the following development areas;

- Peace building and conflict resolution
- Education
- Environmental sustainability
- Economic growth and development
- Good governance
- Gender equality
- Health
- Vulnerable groups

So far, data limitations have hindered the attempt to accurately track and measure impact made by the Millennium Development Goals (MDGs). There is need to measure and profile the contribution of philanthropy in the country. The UN has made deliberate efforts to recognize and engage philanthropy in identifying and implementing Sustainable Development Goals (SDGs - scheduled to be adopted in September 2015). Going forward, data is and will be critical in implementing and reporting on the Post 2015 development agenda.

Kenya in particular is actively engaged in the Post 2015 Agenda and the government has demonstrated commitment to integrating the global development goals at the national and county level. Foundations have a responsibility towards sustainable development; and thus the lack of data on their contributions needs to be addressed. Contributions by foundations need to be highlighted and the philanthropy forum will help to do so.

b. Dr. Gituro Wainaina- Acting Director General, Vision 2030 Secretariat

Public – private partnership approach is vital in designing and implementing the national development agenda. The government has come to the realisation that it can no longer continue working in isolation. Government has made strides to reach out to other development stakeholders and is committed to advancing knowledge based development.

Knowledge based economy (through collection of reliable and credible data) is essential for sustainable development. Kenya is moving from data to informatics; leveraging on technology. This is evident through the government attempts in implementing a Digital literacy program (“the laptops” project). Going digital entails getting the strategy right, technical capabilities (big data analytics and digital content management), adopt digital innovation for creativity, adoption, adaptive, and utilization, strong and adaptive culture, alignment of organizational structures, talent development, funding mechanisms and indicative performance with digital strategy.

In going digital with data we must get our strategies right. - Prof. Gituro Wainaina

Data helps to make projections thus there is need to improve availability of data and knowledge for evidence based decision making, need for informatics driven solutions aimed to improve lives through better analytics (statisticians), better analysis, better policies for improved lives

4.IMPORTANCE OF DATA IN PHILANTHROPIC CONTRIBUTIONS TO THE DEVELOPMENT AGENDA IN KENYA

**a. DATA COLLECTION OPPORTUNITIES FOR PHILANTHROPY IN KENYA -
Dr. Tade Aina- Executive Director, Partnerships for African Social Governance and Research**

Philanthropy is defined as a voluntary use of private resources for public good. The beauty of African philanthropy is in the diversity; from the scope, size and practice. Data collection in Kenya should seek to capture these diversities. Kenya has made commendable progress in advancing its

philanthropy infrastructure; however there is need to strengthen the infrastructure of philanthropy further by strengthening investment and partnerships; and build the ecosystem of philanthropy.

Relevant data is central through the cycle of the programme; planning, implementation, monitoring, evaluation, learning and reporting. It is crucial for accountability, policy making, planning, budgeting, implementing, mobilizing and accounting for funding.

Data hubs are no-longer a reserve of Government. The private sector and CSOs actively generate useful data. For these reasons, there is need for a multi-stakeholder approach in tracking and sharing data. In seeking to organize data, the philanthropy sector needs to prioritize the following;

- Strengthen the philanthropy infrastructure and operating environment
- Create linkages and enhance structured collaborations between philanthropy support institutions at national, regional and international level
- Build the capacity of philanthropic institutions (Foundations & Trusts)
- Deepen the value and ethical principles of philanthropy – e.g. define the identity of philanthropy organizations
- It is also important to engage technical experts in the process and build the capacity of knowledge management among philanthropy support organizations and philanthropic organizations on data collection.

**b. EXPERIENCE IN DATA COLLECTION IN EAST AFRICA - Nicanor Sabula, CEO
– East African Association of Grantmakers**

East Africa Association for Grant makers (EAAG) is a regional body committed to increasing local giving, building strategic alliances for philanthropy, developing a knowledge base and best practices for philanthropy and promoting a vibrant network of supporters of philanthropy.

Demand for information on philanthropy and limited documentation on local philanthropy motivated EAAG to undertake various research projects including the East Africa Giving Survey – a report on the trends and practices of local grant makers in East Africa with a focus on Tanzania, Kenya and Uganda.

EAAG has faced challenges in collecting philanthropy data. These relate to the inability to validate data (inability to get data from the audited accounts), laxity in voluntary provision of data, lack of financial resources and the need to rely on low-cost data collection mechanisms. The research teams tried to overcome some of the challenges by forming a network that allowed them to work together. The networking was a key learning from this process as it was able to respond to unmet need, to prioritise development and share what has worked and what hasn't, but to name a few. However one has to ensure that they enter into effective partnerships that will curb hitches such as duplication, overlaps and unmet gaps.

EAAG is committed to partnering with other philanthropy support programmes and development stakeholder to establish a comprehensive system that can consolidate relevant data on philanthropy and KPF provides a great opportunity to advance the process of consolidating philanthropy data.



Networking at the Kenya Philanthropy Forum – Convening on Data Management in Philanthropy

5.KENYA PHILANTHROPY JOINT DATA INITIATIVE FOR PHILANTHROPY

Arif Neky- National Co-coordinator, Partnership Platform for Philanthropy, UNDP Kenya

The partnership platform for philanthropy - a joint data initiative is an opportunity to engage philanthropists as significant partners in the design and implementation of the Post 2015 global development agenda at the national levels. The initiative would develop a structured mechanism to guide collaboration between philanthropy and other development actors in implementing the SDGs. It also seeks to develop a data repository in Kenya - tracking the contributions of philanthropy in the implementation of international development goals at the national and county level. The data depository, referred to as the **SDG Funders Portal** will go a long way in coordinating, monitoring and reporting on development in Kenya

The initiative seeks to create a local capacity for the partnership to achieve this. The Kenya Philanthropy Forum (KPF) was identified as the platform that would mobilize the philanthropy sector in Kenya to spearhead the process. It will be important to localize the SDGs not only on national level but also on county level.

The SDG Funders Portal - Anne Dalitz, UNDP Kenya

SDGfunders is a global initiative and Kenya is one of five pilot countries. The project is based on an interactive website to track the contributions of philanthropy towards the implementation of the SDGs at the national and county level (leveraging on each dollar invested). One of the goals pursued is to foster partnerships between philanthropy, national governments and other development actors amid the implementation of the SDGs.

SDGs Website will have the following purpose(s);

- Track contributions of philanthropy towards the progress and achievement of the SDGs
- Deepen understanding of the Post-2015 Development Agenda
- Deepen UN understanding of philanthropy's role in implementing the SDGs

- Monitor country progress towards the implementation of the Post-2015 Development Agenda
- Document best practices in regard to development programmes

6. PLENARY DISCUSSION: HARNESSING DATA MANAGEMENT IN PHILANTHROPY

Panelists:

Dr. Tade Aina - Executive Director, Partnership for African Social Governance and Research

Wilmot Reeves – Economic Advisor, UNDP Kenya

Melvin Chibole – Communications Manager, KCDF

The session aimed at identifying strategies that will drive the philanthropy sector towards better data management. Below is a highlight of the priority issues discussed:

a. On Data collection:

- Philanthropy takes many forms – (structured & unstructured - religious, corporate, family, individuals, community giving). The data process should capture and reflect these realities.
- There exists a culture of data collection; however the collation of data is a challenge. Data is largely scattered, incoherent and not well organized; this affects the quality of data that makes it impossible to plan, measure or report efficiently on philanthropy.
- There is need to recognize that data collection is not a cheap venture. It requires investment of time and money to effectively collect, collate and disseminate that information. The government has the capacity to collate data – a partnership would be a good option towards enhancing data quality for philanthropy.
- The Kenya Philanthropy Forum should deliberately develop a strategy that provides guidelines on data management in philanthropy. There is need to establish a common front to define the kind of data needed and the partnerships the Forum is looking to establish. A needs assessment is required towards this end. This will help the sector in developing predictions, profiling beneficiaries among other elements.
- Data collection should capture both qualitative & quantitative data. Efforts should be geared towards having qualitative data recognized and quantified - with new research technology it is now possible to quantify qualitative data – which is essential in demonstrating the value of philanthropy.

Plenary Reflections:

- *Relevant philanthropy data is crucial for planning and implementing development programme:* Key towards strengthening data management would be the coordination of data collection within and outside the philanthropy sector.
- *Have a strong Monitoring and Evaluation culture:* Data is crucial for foundations like the MasterCard Foundation especially also in the area of monitoring and evaluation so as to reduce the risk of funding projects that may not give accurate data results. Data is also important for alignment of efforts (outreach and advocacy to other development partners needs to be consolidated) in order to make informed decisions for effectiveness.

b. On data management approaches

Opportunity lies in county development: need to focus on county level statistics (Economic outlook survey). Contributions of philanthropy sector on grassroots level need to be included in such reports. For instance, demonstration of existing community philanthropy.

c. Partnerships in philanthropy data management

- To develop the culture of data collection, it is important to build a strategic partnership with government bureau responsible for collecting data (Kenya National Bureau of Statistics). This national counterpart in collaboration with philanthropers will form a good team that speaks with one voice on a particular structure as KNBS is still one of the best on the continent.
- There is value in adopting a collective approach in consolidating philanthropy data – It is important to forge strategic partnerships between philanthropy, Government, private sector (PPPs), and data experts etc

for efficient and comprehensive data collection and sharing.

- There should also be a joint meeting to update each other on current data initiatives. Foundations would derive mutual benefit if they cooperate, share and learn from each other.
- Consider leveraging on existing philanthropy infrastructure (*Philanthropy support institutions, research centers, World Bank, NGO Board, Kenya National Bureau of Statistics, EAAG, WINGS and Foundation center etc.*) to collect and manage data. Philanthropy data revolution is global and Kenya can leverage on existing philanthropy data platforms like the Foundation center.
- The Data process can leverage on quarterly fact sheets at meetings at county level to collect data on philanthropy.

- Compliment and consolidate efforts made by other data depository initiatives. Existing platforms include - *Fanikisha, East Africa Data Directory, EAAG, NGO board report, Social Investment Focused Agenda (SiFA)*.

d. Resources for data management.

- There is too little investment in qualitative data. Efficient data management is expensive and there is need to pull resources together to support a collective data initiative.

e. Capacity Building on data management

- It is equally important to strengthen the capacity of foundations in data/knowledge management therefore there is need to enhance the capacity of data collectors, in collecting data. The responsibility of translating data should be focused to those who have experience with it. *SDGfunders.org, KNBS* and the platform for philanthropy is a practical start.

7.THE KENYA PHILANTHROPY FORUM

This session was an opportunity to update the participants on progress made in establishing Kenya Philanthropy Forum as well as share on the proposed structure of the philanthropy forum. From the various deliberations, there is need to focus effort towards:

- More organizations need to be recruited into KPF membership
- KPF members should actively participate in forming and implementing the forum agenda as follows;
 - Represent interests of different philanthropy focus groups in multi stakeholder forums
 - Identify funding priorities and gaps to avoid duplications or omissions
 - Provide linkages between philanthropy sector and other development partners
 - Profile value and contribution to national development
 - Play a component role in the national policy formulation and implementation processes

a. Proposed Structure of the KPF

A brief profile and proposed structure was shared as highlighted in Annex 2. The structure proposes a linkage between the Forum and EAAG; and multi-sector partnerships (with government, development partners, private sector and CSOs).

The following issues were proposed for further discussions in the planning team:

- Whether the EAAG members automatically become KPF members? For now the database of members of KPF includes members of the EAAG. However this would be better addressed in the next steps once the KPF structure is well established.
- The need for clarity on steering committee and secretariat to work collaboratively. It was noted that the committee will carry out the following functions;



Elaborating the Structure – Susan Odongo of KCDF

- Guide agenda of the different philanthropy subgroups identified.
- Develop a membership structure/ membership criteria.
- Design multi-stakeholder engagements/public private framework.
- Determine capacity building & technical support programmes
- Consolidate clear value proposition for KPF

It was noted that the Kenya Philanthropy Forum was heavily presented by corporate foundations, however family

foundations are underrepresented; thus the Forum needs to be extended and diversified.

b. Defining benefits, incentives and Guiding principles of the Forum

Participants were divided into two groups to look at two areas that would further inform the establishment of KPF: one group focused on sharing expectations on the benefits and incentives for the KPF members while the second group focused on sharing expectations on the internal code of conduct/guidelines of the Forum. Below is a highlight of these discussions:

Benefits and Incentives for KPF Members:

- ❖ Access to reliable and relevant information
- ❖ Provide a platform to participate in the formulation & implementation of public policy
- ❖ Provide space for collective bargaining on issues of interest to members—e.g. tax incentives

- ❖ Provide a channel for global linkages and opportunities for joint and improved programming, networking opportunities
- ❖ Provide opportunities for collaboration engaging in multi stakeholder processes at different levels
- ❖ Provide opportunities for joint fundraising on a shared development priority
- ❖ Lobbying platform (represent foundations, act as an advocate for the interests of foundations at higher levels, greater collective bargaining power)
- ❖ Enhanced information sharing through offering greater access to the philanthropy landscape
- ❖ Sharing of best-practices, as well as positive and negative experiences (peer-learning)
- ❖ Raising confidence (opportunity to step out of the shadow of big, international foundations)
- ❖ Access to market intelligence (finding out where the resources are, facilitation of resource mobilization, harness global support)

Expectation on regulations/Code of Conduct of KPF

- ❖ Subscribe to required accountability frameworks /Standards
- ❖ Commitment to KPF vision (*fee payment & Level of participation*)
- ❖ Membership for organizations that have existed for at-least 1 year
- ❖ Regular (annual) progress, evaluation meetings
- ❖ Adoption of accountability framework (common level of standards)
- ❖ Non-partisan, non-political participants
- ❖ Integrity (members must show commitment to active participation)
- ❖ Compliance with rules and regulations (also includes good conduct towards other development partners)
- ❖ Transparency



Participants follow proceedings at the Data Forum

8.CONCLUSION

The Data Forum was a good initiative towards encouraging the sector to build its capacities and invest in managing data on philanthropy better. There is need to engage the Kenya Bureau of Statistics as the National Agency on data to discuss effective ways of capturing the contribution of the philanthropy sector in Kenya's development. It was further noted that there was need for clarity on key data sets that need to be put in place to effectively collect data that is able to demonstrate the sector's input to development. The Forum planning team was tasked to initiate actions on the convening outcomes towards strengthening the forum.

Rosemary Mutunkei of the Aga Khan Foundation shared a vote of thanks on behalf of the organizing team and acknowledged that the data convening was an eye opener on the importance of data for the sector moving forward.



Dr. Manu Chandaria of the Chandaria Foundation, Dr. Tade Aina of PASGR (extreme left), Dr. Wainaina of Vision 2030 and Mr. Wilmor Reeves at the Kenya Philanthropy Forum – Convening on Data Management in Philanthropy

ANNEXES

ANNEX 1: List of Participants

Organization	Name
Aga Khan Foundation	Rosemary Mutunkei
Aga Khan Foundation	Kristi Maasjo
Ambassador F.K. Muthaura Foundation	Sophy Catherine Wanjiku Njoroge
Bill and Melinda Gates Foundation	Samburu wa Shiko
Chandaria Foundation	Manu Chandaria
Chandaria Foundation	Hirji Shah
Cooperative Bank Foundation	Stephen Gichuki
CSI/CSR Consultant	Kevin Doyle
EAAG	Catherine Mbutu
EAAG	Nicanor Sabula
EDMUD Trust	Charles Njoroge
Ford Foundation	Maurice Makoloo
Gertrude's Hospital Foundation	Carol Waweru
Gertrude's Children Hospital	Gordon Odundo
Global Education Fund	Daniel Masawi
HAKI Foundation	Ephantus Muhunyo
Hilde Back Education Fund	Sarah W Njuru
Housing Finance Foundation	Mercy Musau
KCDF	Susan Odongo
KCDF	Melvin Chibole
Kengen Foundation	Anthony Igecha
KEPSA	Eunice Mbulu
MasterCard Foundation	Ivy Mwai
Partnership for African Social and Governance Research	Tade Aina
Research Plus Africa	Mokeyra Masita – Mwangi
Safaricom Foundation	Janice Mwendameru
UNDP	Wilmot Reeves
UNDP K	James Ochweri
UNDP K	Arif Neky
UNDP K	Anne Dalitz
Uraia Trust	Moyi Aloyce
Vision 2030	Gituro Wainaina
Viwango	Mary Kanyua
Viwango	Godson Wanyera
VSO	George Awalla

ANNEX 2: Profile of Kenya Philanthropy Forum

A. INTRODUCTION

The KPF is an organized forum that brings together philanthropy institutions and individuals to interact, share and engage in efforts that promote philanthropy in Kenya. The forum further seeks to heighten recognition of the philanthropy sector in the national development agenda.

B. VISION

A collaborative, inclusive and influential forum for Kenyan philanthropists

C. MISSION

To pool our resources, expertise and best practices for greater human transformation and improvement in quality of life

D. STRATEGIC INTENT OF THE FORUM

Enhance cooperation and coordination among philanthropy actors in Kenya and other stakeholders in the private and public sphere – and explore opportunities for greater impact of the sector in national development.

E. OBJECTIVES

The specific objectives are:

- i. To strengthen partnerships among the philanthropy actors through building synergies and leveraging investment resources for greater impact.
- ii. Positively engage national and county governments and other multilateral partnerships to influence public policies and proactively respond to development challenges - to enhance a favorable environment for growth and impact of philanthropy in Kenya.
- iii. To provide institutional strengthening to philanthropy actors in program development and implementation.
- iv. To strengthen collective research, collation of data, documentation, peer learning, sharing of information and best practices for greater influence and impact of the philanthropy sector.

F. MEMBERSHIP

The Forum will be an all-inclusive membership that reflects the different interests & forms of philanthropy in Kenya.

Philanthropic actors are welcome to join the forum under the following criteria:

- Nonpolitical and non-partisan
- Legally registered and working in the Kenyan environment
- An organization has a demonstrated record and commitment to social investments and development work.

Membership will be under the following categories:

1. Full membership:

This is open to organizations that are legally established or with a legal presence in Kenya that meet all published criteria for membership as determined from time to time by the Kenya Philanthropy Forum (KPF).

- This is an organization whose core business is philanthropy.
- An organization with an autonomous arm in philanthropy
- Has been in operation for at least one year
- Has an office in Kenya

Affiliate membership:

These are organizations that are partially fulfilling the criteria for membership and fully support the mission and the objectives of KPF.

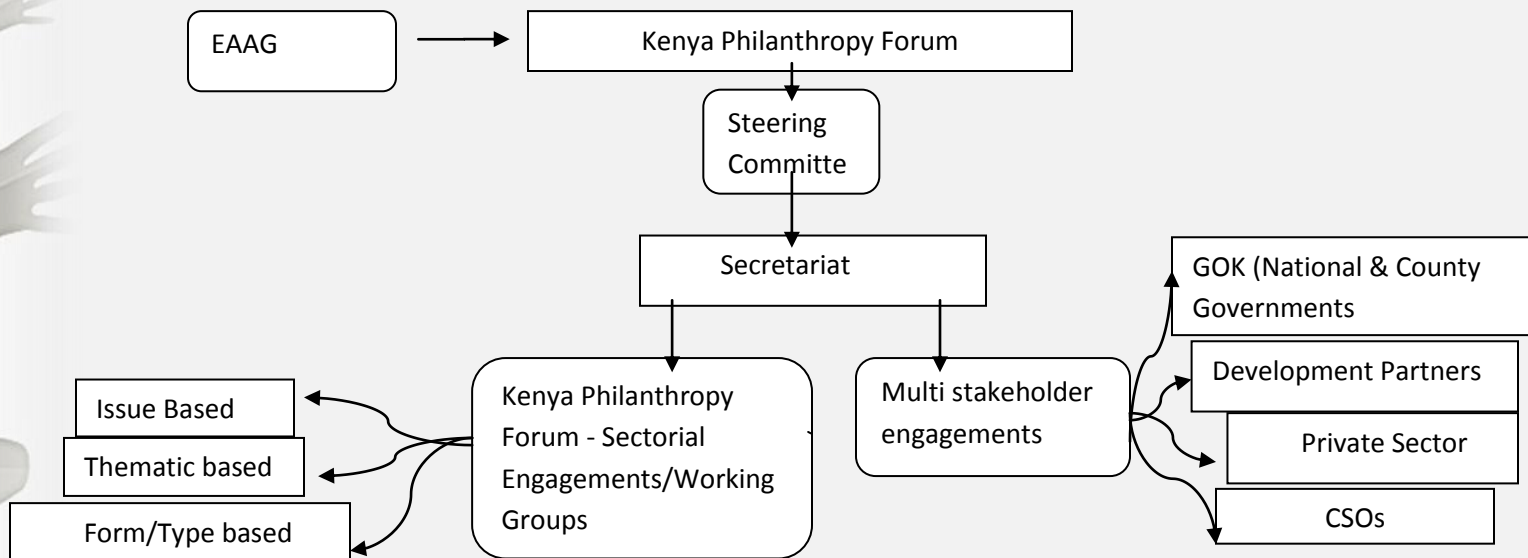
- An organization that lacks full autonomy have an autonomous arm and is active in philanthropy

2. Associate membership:

These include organizations or Individuals that have an interest or involvement in the practice of philanthropy in line with the mission and the objectives of the KPF.

- An organization that provide research, consultancy or capacity building services in philanthropy.
- Individuals who practices or promote philanthropy

G. PROPOSED STRUCTURE OF THE FORUM:



- **The Kenya Philanthropy Forum:** this will be the overall forum on which all institutions will coalesce.
- **Steering Committee:** this will be a group of selected members from the Forum who will give the general direction and leadership of the Forum.
- **Secretariat:** This will be the engine of the Forum that will ensure the coordination and manage the day-to-day running of the Forum's activities.
- **KPF Sectorial Engagements:** These are the sectoral working groups. This will include joint inter-agency engagements on
 - specific issues of interest to the group - e.g. the PBO Act - or
 - thematic based – e.g. health, education or
 - The forms/types of the philanthropy actors (e.g. corporate foundations).
- **Multi stakeholder engagement –** these will be platforms on which KPF can be able to engage to foster stronger linkages in response to Kenyan development context and influence the policy agenda and development priorities periodically. These engagement will be with :
 - Government (National and County)
 - Development Partners
 - Private Sector
 - CSOs



AGA KHAN FOUNDATION



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